Add an OTC Endpoint from the Highest Level of an Organizational Hierarchy

The **Accounting Specialist, Local Accounting Specialist**, **Check Capture Administrator**, **Check Capture Supervisor** and **Card Administrator** can add endpoints.

To add an OTC Endpoint from the highest level of an organization hierarchy, complete the following steps:

1. Click the **Administration** tab.

2. From the **Manage Organization** menu, select **Organization Hierarchy** and select **Modify**. The *Step 1 of 3: Select an OTC Endpoint* page appears.

3. Select your OTC Endpoint that appears in the list. The *Step 2 of 3: Update OTC Endpoint Information* page appears.

4. Check the **Add lower levels to this OTC Endpoint** checkbox.

   Application Tip

   In the table that appears you can add new **OTC Endpoints** that fall in the level under the current **OTC Endpoint**.

5. Enter the Lower Level OTC Endpoint's **Short Name(s)** and **Description(s)** and click **Next**.

   Application Tip

   Short name(s) are user-defined text describing an organization. Short names must be unique within an organization hierarchy (e.g. Short name: IRS; Description: Internal Revenue Service).

> **Application Tip**
>
> Special characters are accepted in **Short Name** and **Description** fields; however, only use standard American Standard Code for Information Interchange (ASCII) characters. The standard ASCII range is 32-126. If non-standard ASCII characters (0-31, 127-255) are entered in the **Short Name** and **Description** fields, ISIM will not display the endpoint name in the **Level** drop-down field. Additionally, if non-standard ASCII characters are entered, you will not be able to manage OTC Endpoints (select endpoints) in OTCnet Offline. Instead an error message appears asking that Customer Support is contacted.

6. In the *Step 3 of 3: Review OTC Endpoint(s)* page, review and verify the OTC Endpoint details and click **Submit**. A confirmation page appears showing the OTC Endpoint has been modified (added lower level OTC Endpoint).

> **Application Tip**
>
> Additional buttons on the page help you perform other tasks:
> - Click **Add More Lines** to insert additional rows to the table, to input additional Agency accounting codes.
> - Click **Cancel** to return to the OTCnet Home Page. No data will be saved.
> - Click **Previous** to return to the previous page.
> - Click **Return Home** to return to the OTCnet Home Page.